Appendix 2:
2019 CalEITC Education and Outreach NOFA
Frequently Asked Questions (FAQs)

Q: How and where do we to access information on the federal EITC and free tax preparation assistance services?

A: Information on the CalEITC, the federal EITC, and free tax preparation assistance services can be found at FTB.ca.gov and CalEITC4Me.org. Collateral materials from the Franchise Tax Board (FTB) with current tax season information are typically available at no charge in December.

Q: If an applicant is applying for more than one target area, must they submit multiple Notices of Intent to Apply (NIA) documents?

A: No, only one NIA is necessary. Please indicate on the NIA all the target areas for which you intend to apply. Notices of Intent to Apply will not be published on the CSD public website.

Q: I do not see my specific county listed in any of the targeted areas. Can my organization still apply?

A: If a specific county is not expressly identified in Target Areas 2 – 14, then the county will be served through either the Statewide (Target Area 1) or the Rural – if the county has 100,000 or fewer residents (Target Area 15) grants. The counties in the target areas were identified because they have the highest proportion of eligible CalEITC filers. Organizations that apply for the Statewide or Rural grants are expected to reach the broadest audience as effectively as possible.

Q: For Statewide applicants - what is the level of information needed in terms of geographic area, for reporting purposes?

A: Awarded applicants will need to provide geographic information for the following strategies: Canvassing, Media, and Collateral Messaging. The degree of granularity will depend on the specific activity. For instance, a grantee would report door-to-door canvassing at the zip code level, but collateral material distribution to a school district would be reported differently. Although canvassing is not required for Statewide or Rural grantees, person-to-person interactions by a trusted messenger have been shown to provide the greatest impact. Rural and Statewide applicants should consider the feasibility of incorporating this strategy into their application.

Q: Regarding the application: Is there a sample format for the reference letters?

A: No, there is not a sample format for reference letters. However, letters of reference are required to be recent, dated within a 12-month period, and should be from organizations that are familiar with the applicant's qualifications, experience, and past performance on education and outreach related activities. Reference letters are not required from 2018 grantees.

Q: Please clarify "personally identifying data of individuals" and the process the FTB has in place to collect this data.

A: To facilitate the evaluation of the efficacy of the education and outreach efforts, grantees are required to provide information on individuals who have received education and outreach to help ascertain the impact it had on their behavior. The most useful information to FTB is the filer's contact information: name, phone number, address, or social security number (SSN). Additionally, determining the number of children residing in the household and whether the filer is married is useful to further narrow down matches potentially found in FTB's datasets.

At a minimum, FTB expects to collect data regarding the type of contact made (direct mail, in-person, phone call, text, etc.) and the location of the contact (address and city, or zip code), utilizing an FTB Data Collection spreadsheet (provided to awarded grantees at a later date). FTB will use this information to determine if the zip codes where outreach was conducted have a higher percentage of eligible Californians filing for the credit than those areas where there was no outreach effort. The sharing of information will be limited to activities where personally identifiable information is already being collected.

Q: What is the indirect cost rate? Beyond rent and staff, what other costs can be included as an indirect cost?

A: Indirect cost rates are predetermined at the organization level and are inclusive of all the support and administrative costs needed to run an organization. Applicants should make every effort possible to minimize overhead/administrative costs and target available funding towards providing direct services.

Q: Can a subcontractor be added after the fact?

A: Yes, subcontractors may be added throughout the duration of the contract period as its delivery strategies are refined; a subcontractor's organization name is enough information.

Q: Is there still a requirement to reach people within designated ZIP codes?

A: The Organizational Capacity section of the Application Narrative Template (CSD 171ANT) asks applicants to describe how they are targeting, including the ZIP codes they plan to serve. Competitive applications for Target Areas 2– 14 should demonstrate how they will serve the ZIP codes identified as having the highest potentially eligible residents. This information can be found in Appendix 1 – Maps of Target Areas.

Q: What type of activity is considered canvassing?

A: Canvassing activities are defined for the purpose of this NOFA as those that are targeted one-to-one interactions such as, but not limited to, door-to-door canvassing, text messaging, and phone banking.

Q: Is there any cash or in-kind match for this grant?

A: Due to the size of the grant, CSD removed the requirement for a match to ensure that organizations had equal access to apply.

Q: Many past activities for contracts with CSD were completed during fiscal years rather than calendar years. Is it preferred that we total all numbers for January through December or report by contract/fiscal year?

A: Activities should be reported by calendar year to synchronize with the tax filing requirements.